



Santrax Electronic Visit Verification Fixed Visit Verification Device Financial Management Services Agency/ Consumer Directed Employer Visit Maintenance and Report Training

➔ Introduction

- Fixed Visit Verification (FVV) Calls in Santrax Visit Maintenance
- Running FVV Reports

This training presentation is for Electronic Visit Verification (EVV) FVV only. Additional EVV training materials can be accessed via the DADS EVV website at <http://www.dads.state.tx.us/evv/training.html>

- How to identify FVV Device calls in Santrax Visit Maintenance.
- How to identify the call times and visit verification numbers in Santrax Visit Maintenance.
- How to run FVV Device reports in Santrax.

- Introduction
- ➔ FVV Calls in Santrax Visit Maintenance
- Running Reports

Benefits of FVV

- The FVV Device is used to capture in and out times of the attendant when a landline home telephone is not available for use.
- When used correctly, visit maintenance should not be required to document FVV visits.
- To limit time and effort for visit maintenance, providers should ensure all staff follow the FVV process.

FVV: What to expect in Santrax Visit Maintenance

When FVV Device information is called in by the CDS Employee, there are several possible errors that could occur. These errors are corrected using Visit Maintenance.

The Santrax Visit Maintenance module allows for editing visit information by designated users. This is covered in detail in the Santrax user manual via the DADS EVV site at <http://www.dads.state.tx.us/evv/training.html>

****NOTE:** Review Visit Maintenance on a daily basis. If corrections need to be made, Sandata recommends waiting until the following day.

FVV: What to Expect in Santrax Visit Maintenance

When a Santrax call is received in which an FVV value has been entered, an FVV icon is displayed in the view column in Santrax Visit Maintenance. This icon appears as a green box with a light green button icon inside.

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Visit Maintenance
Thu Jun 30 13:51:04

☐ Exception Types
☒ All Exceptions
☐ All Visits

From: 06/15/2011 To: 06/30/2011
 View Selected Visit Type Client: View Selected SPV Category: Employee: DEP: Contract:

Select Visits Create Schedule Delete Visit Undo Legend Get Report Exit

Total Visits: 23

SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs	Memo	M/C	C	Task	Exp	No Exp
	Client, FVV	Santrax, Debra		Fri 06/17				13:03	16:12	03:09	03:09		☒				☐
SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs	Memo	M/C	C	Task	Exp	No Exp



FVV: What to expect in Santrax Visit Maintenance

If an FVV icon is clicked, a description of the call will appear in a pop up. It includes:

- The first and second visit verification numbers (FVV Values).
- The *call in* time and *call out* time.
- The Caller (the CDS Employee) and Client/Individual associated with the call.

Fixed Visit Verification(FVV)

Caller: A, MARIA

Client: B, DORA

Call Received: 5/4/2011 7:02:11 PM

Calculated Date/Time	FVV Value	Type
5/3/2011 7:42:32 AM	087-823	Call In
5/3/2011 8:21:32 AM	043-104	Call Out

Reinforce that if the CDS Employee knows that there was a problem with entering visit information during the FVV Device call, the CDS Employee should contact their CDS Employer.

If FVV Device visits have missing information or there are errors in the information, the CDS Employer will need to fill in the missing data or make corrections using Visit Maintenance. This is the same process that is used for missing or incorrect information in landline home telephone calls.

Examples of missing or errors in data include:

- Client ID is entered incorrectly.
- Employee ID is entered incorrectly.
- Multiple FVV calls are made.
- Client ID and Employee ID are both entered incorrectly.
- FVV Device In or Out values are entered incorrectly.

FVV Call-Invalid Client ID

In the FVV call process, after pressing the star (*) key to indicate an FVV call, the CDS Employee will be prompted to enter the Client's ID.

"Please enter first Client ID."

If the Client ID is entered incorrectly, the CDS Employee will hear the following prompt:

"No FVV registered, please re-enter the client ID or press the pound key to continue."

- The CDS Employee should re-enter the correct Client ID, and will be prompted to continue the FVV call.
- If the Client ID is not accepted after repeated attempts, the CDS Employee should hang up, contact their agency for the correct Client ID and try the call again.

Visit Maintenance-Invalid Employee

SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C
	Client, FVV	000-57-4623	☒	Fri 06/17				13:03	13:12	00:09	00:09	☐		M
SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C



In this example, a call was made to enter FVV values but the CDS Employee entered an incorrect Santrax ID. Once this unknown employee is identified and corrected, Memo Code 02 for Invalid ID-PCA Verified should be selected.

Visit Maintenance- Unknown/Invalid Client

In this example, the CDS Employee entered an incorrect client ID for the individual receiving services, therefore, this is flagged in red as an example of an unknown client. The FVV icon will not be displayed. The CDS Employer should work with the CDS Employee to determine the reason for the unknown client and resolve by updating the client ID and **adjusting pay hours accordingly**. Use the appropriate memo code(s) to document the reason for the correction. CDS Employers should note actual hours worked in the free text field, for example 10:09AM – 10:34AM.

SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C	C	Tas
	(516)526-9439	Fry, Ted		Fri 06/17				13:09				☐		M		
SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C	C	Tas



When the Client ID is entered incorrectly, or not at all, the time of the call (not the time of the visit) appears in Call Start.

Visit Maintenance- Unknown Client and Employee

SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C
	(516)526-9439	000-06-5893		Fri 06/17				13:15				☐		M
SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C



- In this example, the CDS Employee entered an incorrect Santrax ID and was unable to enter a correct individual's client ID therefore, both the client and employee are unknown and are flagged in red.
- The CDS Employer will not see this visit recorded, and will need to contact their FMSA to correct the visit.
- Only the FMSA will have the ability to view these types of visits for security reasons. Therefore, only the FMSA will be able to correct these types of visits. The FMSA should work with the CDS Employer to determine the reason for the unknown client/employee and then resolve in Visit Maintenance by correcting the unknown client/employee and adjusting pay hours accordingly. Use the appropriate memo code(s) to document the reason(s) for the correction and include the actual time worked in the text field.
- Once corrections are completed, the visit can be viewed by the CDS Employer.

Visit Maintenance- Multiple FVV Calls

In this example, FVV values were input by the CDS Employee for the same visit on different calls. Santrax will apply visit matching rules to automatically associate the FVV values with the correct visit, and no visit maintenance is required. If the matching rules do not determine a match, the CDS Employer will need to resolve any missing or unmatched call information in Visit Maintenance.

FVV Call- Incorrect FVV Values

- In the FVV call process, after entering the Client ID correctly, the CDS Employee will be prompted to enter the first FVV number: **"Enter the first visit verification number."**
This is the first number obtained from the FVV Device when the CDS Employee arrived at the individual's home and will represent the time in.
- If the FVV number is entered incorrectly, the CDS Employee will hear the following prompt: **"Invalid visit verification number, please try again."**
- The CDS Employee should re-enter the correct FVV number, and they will be prompted to continue the FVV call.
- If the employee does not successfully enter the correct FVV Number, they should hang up and contact their CDS Employer to correct the visit using Visit Maintenance.

Visit Maintenance- Missing Call Out

When a call was made to enter FVV values but the CDS Employee entered the second FVV value incorrectly, or not at all, the call end is missing and the call end box will be red.

Pay hours must be manually entered and Memo Code 06 for Attendant failed to call in/out, individual verified attendant worked hours as entered should be selected. CDS Employers should note actual hours worked in the free text field, for example 07:07AM – 10:34AM.



SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C	C	T
	Client, FVV	Texas, Lovely		Mon 06/20				07:07				☐				
SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo	M/C	C	T



When the FVV icon is showing, the Call Start/End values represent the time of the visit (not the time of the call).

FVV Call - No FVV Values Input

- In the FVV call process, after entering the Client ID correctly, the CDS Employee will be prompted to enter the first FVV number:

"Enter the first visit verification number."

This is the first number obtained from the FVV Device when the CDS Employee arrived at the individual's home and will represent the time in.

- If the CDS Employee does not enter both FVV numbers, they will hear the following prompt: ***"You have not entered any visit verification numbers, press 1 to return or press the # key to continue."***
- The CDS Employee should enter the FVV numbers if known, and they will be prompted to continue the FVV call.
- If the CDS Employee does not know or has not successfully entered the FVV Numbers, they should hang up, and contact their CDS Employer to correct the visit using Visit Maintenance.

Visit Maintenance- No FVV Values Entered

When a call was made to enter FVV values but the CDS Employee did not enter any values, the Call Start time will be clearly flagged in pink and there will be no FVV symbol on the visit line. This exception is referred to as an Unmatched Client Phone/ID. The CDS Employer should work with the CDS Employee to determine the reason for the missing FVV values and resolve in Santrax Visit Maintenance by adjusting pay hours accordingly. Use the appropriate memo code(s) to document the reason for the correction. CDS Employers should note actual hours worked in the free text field, for example 08:09AM – 08:34AM.

SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo
	Client, FVV	Rose, Debra		Mon 06/20				09:19				☐	
SPV	Client	Employee	FVV	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs		Memo



When the FVV values are not entered at the time of the call, the time of the call (not the time of the visit) appears in Call Start

Missing FVV Device Data - Correcting Pay Hours

- To resolve visits where the CDS Employee did not call in or out, the CDS Employer must correct the Pay Hours. To do that, click once in the Pay Hours box and type the actual hours worked (and hit enter). The pay hours format must be input as 4 digits, add a 0 if less than 10 hours.

Examples:

1 hour = 0100

1 hour 30 minutes = 0130

Manually corrected hours will appear in **bold**.

Remember to add a Memo Code to give the reason for the correction and enter the actual hours worked in the free text field.

- Introduction
- FVV Calls in Santrax Visit Maintenance
- ➔ Running FVV Reports

FVV Related Reports

Here are the new reports related to FVV and a description of the content for each report:

- **FVV Assignment Report:** Displays the client, the FVV Device serial numbers and the date and time they were registered.
- **FVV Call Listing Report:** Displays client and employee information for all calls made using FVV values.
- **FVV Registrations Report:** Displays the serial number, client information, registration date and deactivation date for a date range.

Step 1: To view the FVV Assignment Report, select **Daily** from the green menu bar at the top of the page.



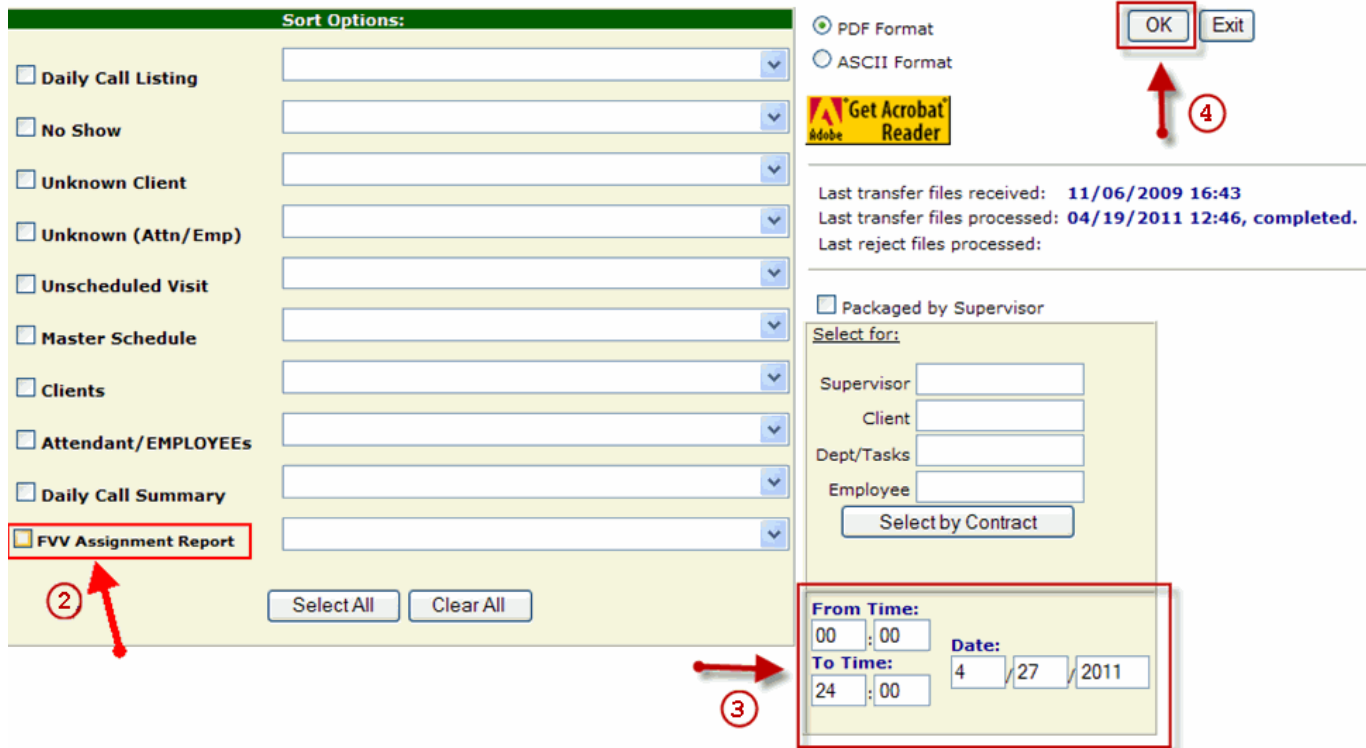
Running the FVV Assignment Report - Steps 2, 3, and 4

FMSA Only

Step 2: Check the box next to the FVV Assignment Report.

Step 3: Choose the time and date range for the report.

Step 4: Then select **OK** to view the report.



The screenshot shows a web-based interface for selecting report options. On the left, under the heading "Sort Options:", there is a list of checkboxes and dropdown menus. The checkbox for "FVV Assignment Report" is highlighted with a red box and a red arrow labeled with a circled "2". Below this list are "Select All" and "Clear All" buttons. On the right side of the interface, there are radio buttons for "PDF Format" (selected) and "ASCII Format". Below these is a "Get Acrobat Reader" button. Further down, there is a section for "Last transfer files received:", "Last transfer files processed:", and "Last reject files processed:". Below this is a "Packaged by Supervisor" checkbox and a "Select for:" section with input fields for "Supervisor", "Client", "Dept/Tasks", and "Employee", along with a "Select by Contract" button. At the bottom right, there is a "From Time:" and "To Time:" section with time pickers (00:00 to 24:00) and a "Date:" section with a date picker (4/27/2011). This entire time and date section is highlighted with a red box and a red arrow labeled with a circled "3". At the top right, there are "OK" and "Exit" buttons. The "OK" button is highlighted with a red box and a red arrow labeled with a circled "4".

Step 1: To view the FVV Call Listing Report select **Date Range** from the green menu bar at the top of the page.



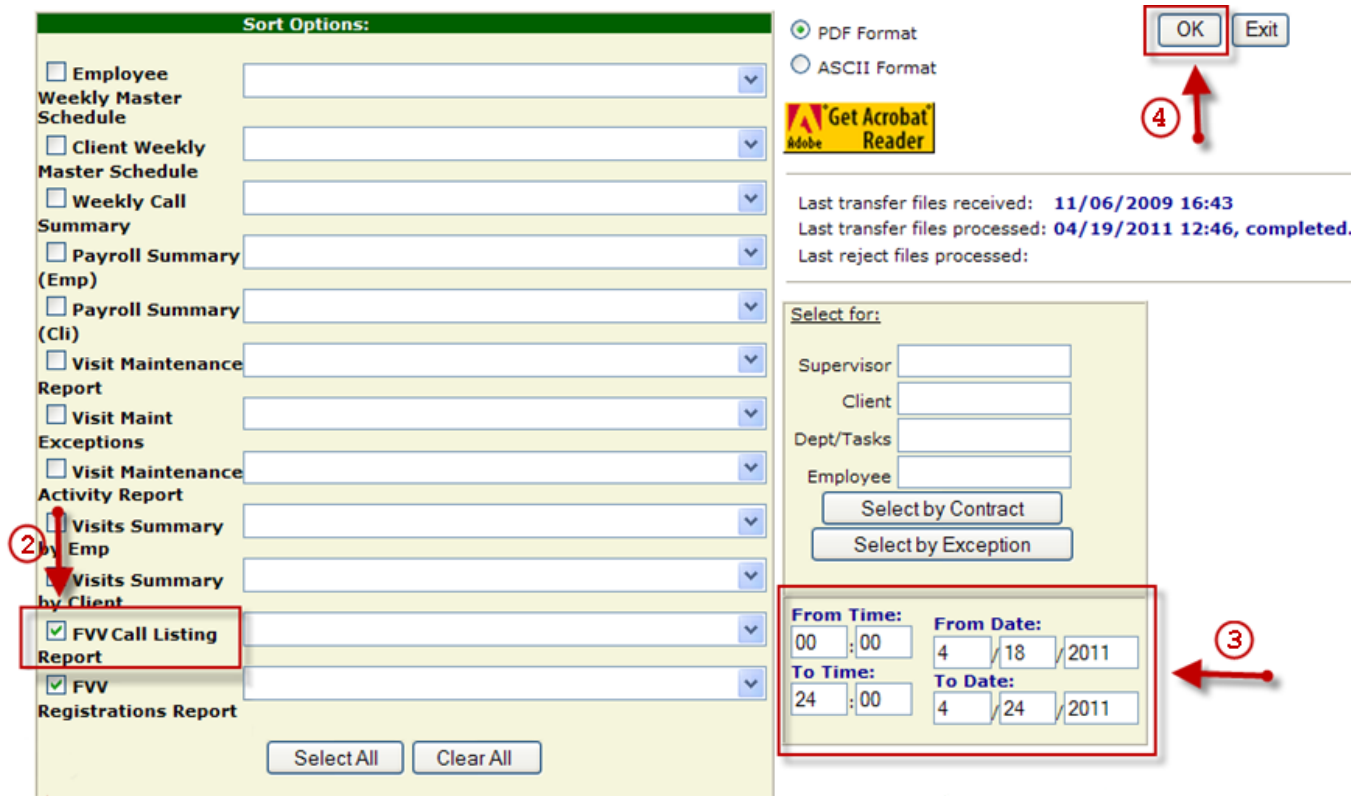
Running the FVV Call Listing Report - Steps 2, 3, and 4

FMSA Only

Step 2: Select the check box next to FVV Call Listing Report

Step 3: Select the time and date range.

Step 4: Select **OK** to view the FVV Call Listing Report.



The screenshot shows a web-based interface for selecting report options. On the left, under 'Sort Options:', there is a list of report types with checkboxes. A red box and arrow labeled '2' point to the 'FVV Call Listing Report' checkbox, which is checked. Below this list are 'Select All' and 'Clear All' buttons. On the right, there are radio buttons for 'PDF Format' (selected) and 'ASCII Format'. Below these is an 'Adobe Get Acrobat Reader' button. Further right, a red box and arrow labeled '4' point to 'OK' and 'Exit' buttons. In the center-right, there is a section for 'Last transfer files received: 11/06/2009 16:43', 'Last transfer files processed: 04/19/2011 12:46, completed.', and 'Last reject files processed:'. Below this is a 'Select for:' section with input fields for Supervisor, Client, Dept/Tasks, and Employee, and buttons for 'Select by Contract' and 'Select by Exception'. At the bottom right, a red box and arrow labeled '3' point to a date and time selection area. This area has two columns: 'From Time' and 'From Date' on the left, and 'To Time' and 'To Date' on the right. The 'From Date' is set to 4/18/2011 and the 'To Date' is set to 4/24/2011.

Step 1: To view the FVV Call Listing Report select **Date Range** from the green menu bar at the top of the page.



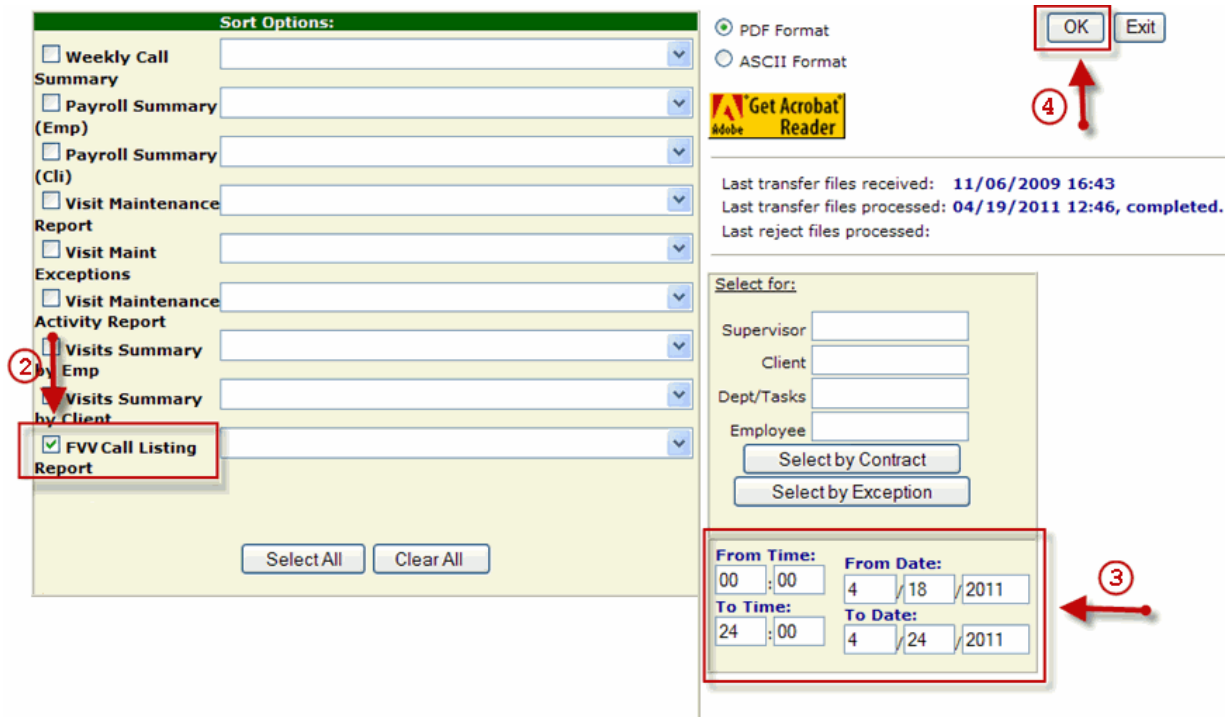
Running the FVV Call Listing Report - Steps 2, 3, and 4

CDS Employer Only

Step 2: Select the check box next to FVV Call Listing Report

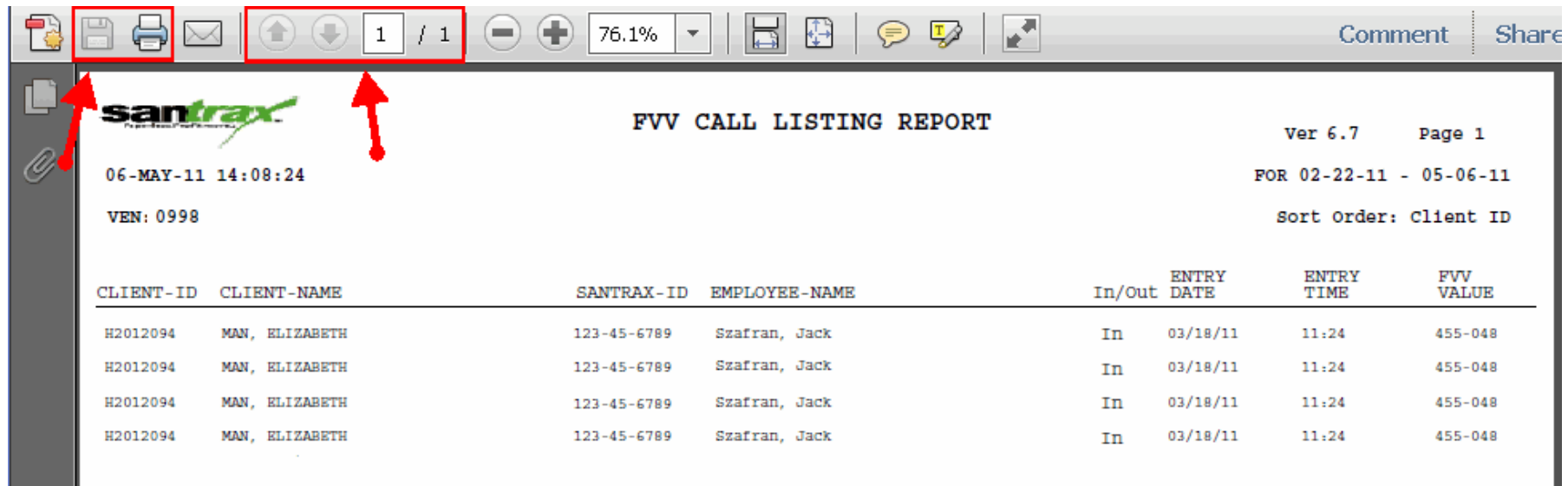
Step 3: Select the time and date range.

Step 4: Select **OK** to view the FVV Call Listing Report.



The screenshot shows a web-based interface for selecting report options. On the left, under 'Sort Options:', there is a list of report types with checkboxes. A red box and arrow labeled '2' point to the 'FVV Call Listing Report' checkbox, which is checked. Below this list are 'Select All' and 'Clear All' buttons. On the right, there are radio buttons for 'PDF Format' (selected) and 'ASCII Format'. Below these is a 'Get Acrobat Reader' button. Further right, 'Last transfer files received' and 'Last transfer files processed' dates are shown. At the bottom right, a 'Select for:' section contains input fields for Supervisor, Client, Dept/Tasks, and Employee, along with 'Select by Contract' and 'Select by Exception' buttons. Below this is a date and time selection area with 'From Time', 'To Time', 'From Date', and 'To Date' fields. A red box and arrow labeled '3' point to this area. At the top right, there are 'OK' and 'Exit' buttons. A red box and arrow labeled '4' point to the 'OK' button.

- The report will appear in PDF format, which can be printed or saved to your computer.
- Select the arrows to scroll through the pages.



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06-MAY-11 14:08:24

VEN: 0998

FVV CALL LISTING REPORT

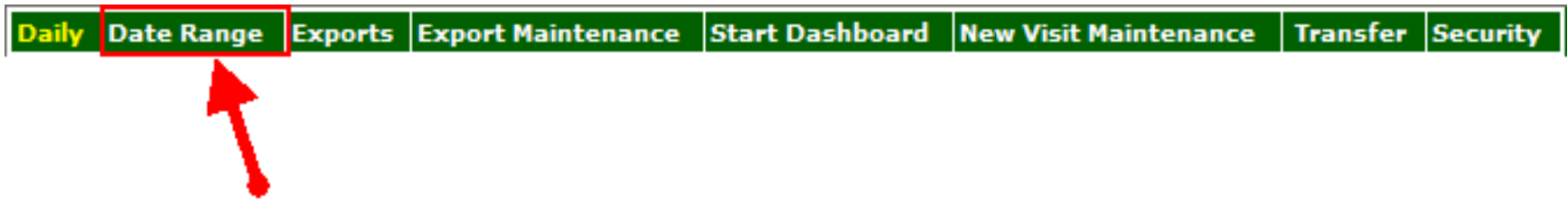
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FOR 02-22-11 - 05-06-11

Sort Order: Client ID

CLIENT-ID	CLIENT-NAME	SANTRAX-ID	EMPLOYEE-NAME	In/Out	ENTRY DATE	ENTRY TIME	FVV VALUE
H2012094	MAN, ELIZABETH	123-45-6789	Szafran, Jack	In	03/18/11	11:24	455-048
H2012094	MAN, ELIZABETH	123-45-6789	Szafran, Jack	In	03/18/11	11:24	455-048
H2012094	MAN, ELIZABETH	123-45-6789	Szafran, Jack	In	03/18/11	11:24	455-048
H2012094	MAN, ELIZABETH	123-45-6789	Szafran, Jack	In	03/18/11	11:24	455-048

Step 1: To view the FVV Registrations Report select **Date Range** from the green menu bar at the top of the page.



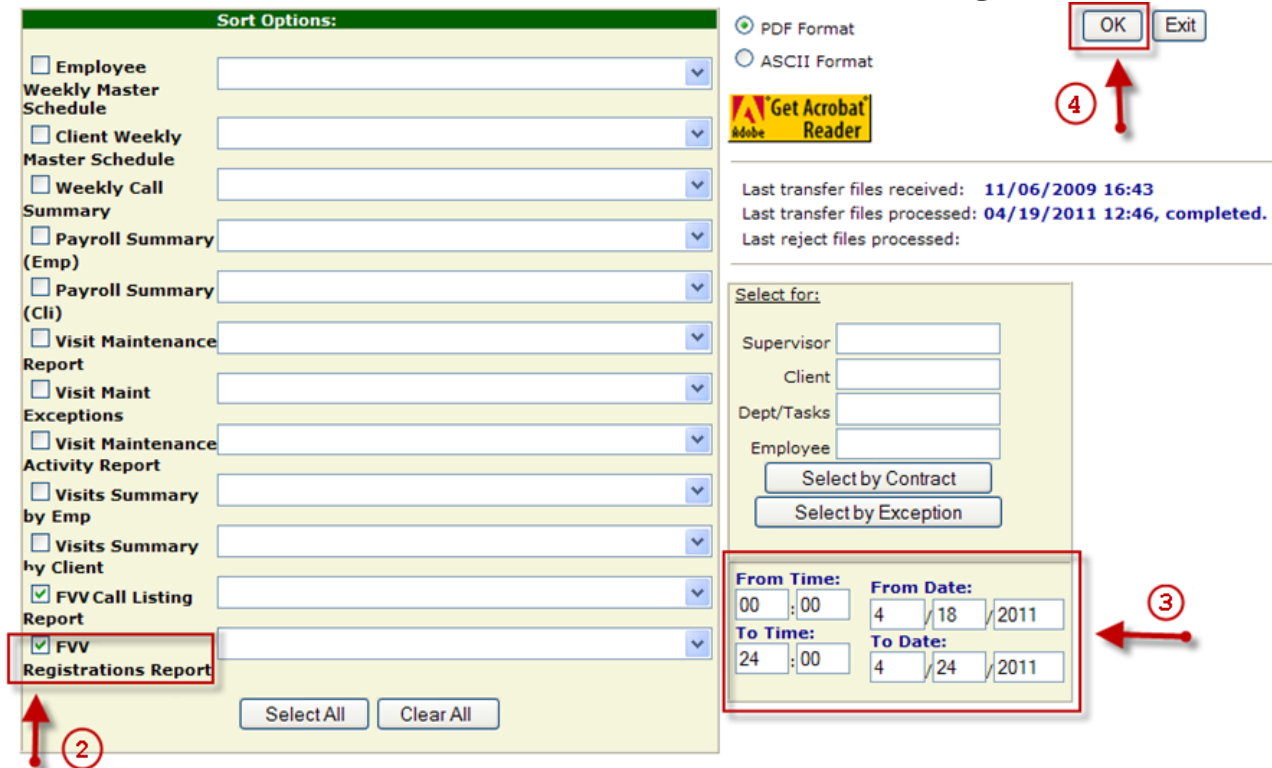
Running the FVV Registrations Report - Steps 2, 3, and 4

FMSA Only

Step 2: Select the check box next to FVV Registrations Report.

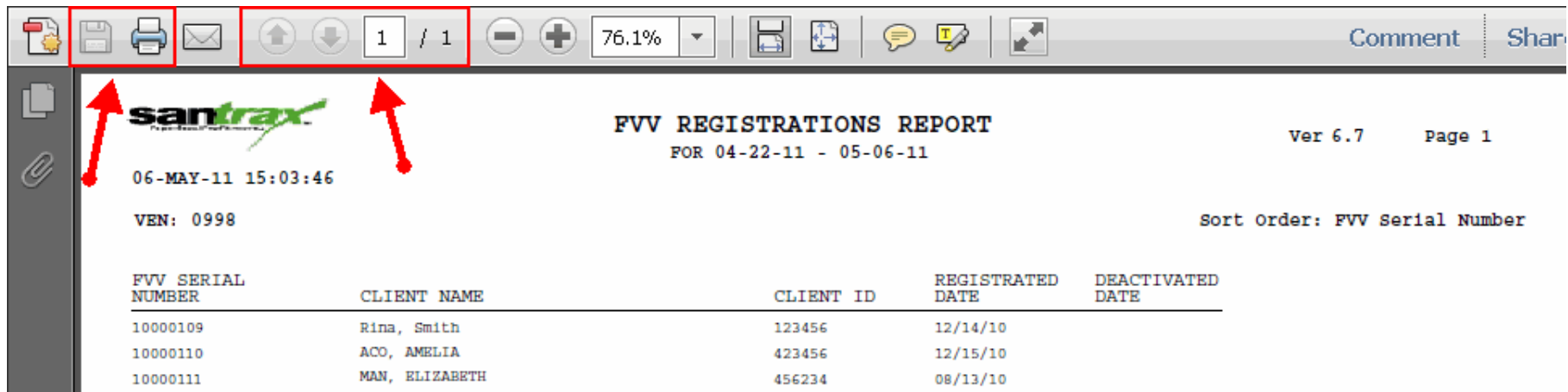
Step 3: Select the time and date range.

Step 4: Select **OK** to view the FVV Registrations Report.



The screenshot shows a web-based interface for selecting report options. On the left, under 'Sort Options:', there is a list of checkboxes and dropdown menus. The checkbox for 'FVV Registrations Report' is checked and highlighted with a red box and an upward arrow labeled '2'. Below this list are 'Select All' and 'Clear All' buttons. On the right, there are radio buttons for 'PDF Format' (selected) and 'ASCII Format'. Below these is a 'Get Acrobat Reader' button. Further right, there are 'OK' and 'Exit' buttons, with the 'OK' button highlighted by a red box and an upward arrow labeled '4'. In the center-right, there is a section for 'Last transfer files received' and 'Last transfer files processed'. Below this is a 'Select for:' section with input fields for Supervisor, Client, Dept/Tasks, and Employee, and buttons for 'Select by Contract' and 'Select by Exception'. At the bottom right, there is a date and time selection section with 'From Time', 'To Time', 'From Date', and 'To Date' fields. The date range is set to 4/18/2011 to 4/24/2011, and the time range is 00:00 to 24:00. This section is highlighted with a red box and a leftward arrow labeled '3'.

- The report will appear in PDF format, which can be printed or saved to your computer.
- Select the arrows to scroll through the pages.



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FVV REGISTRATIONS REPORT
FOR 04-22-11 - 05-06-11

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06-MAY-11 15:03:46

VEN: 0998

Sort Order: FVV Serial Number

FVV SERIAL NUMBER	CLIENT NAME	CLIENT ID	REGISTERED DATE	DEACTIVATED DATE
10000109	Rina, Smith	123456	12/14/10	
10000110	ACO, AMELIA	423456	12/15/10	
10000111	MAN, ELIZABETH	456234	08/13/10	

What you have learned

In this presentation you have learned:

- How to view FVV calls in Santrax Visit Maintenance.
- How to review FVV Visit Maintenance.
- The purpose of FVV Related Reports.
- How to run and review FVV reports in Santrax.

Should you have any questions contact Sandata at (855)781-2079.

For additional FVV training, please access the additional training modules:

[FVV Overview Request Training \(CDS\):](#)

Overview and request process.

[FVV Install Call Training \(CDS\):](#) FVV Device installation and call process.